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  Platforms, Publishers & Privacy

2023 Spark



Joss Milord
Privacy Regulations



Scott Marin
Campaign Manager 360

P2 Annual Plan

2023 P3 GPL **Business** priorities

02 2023 Priorities

Grow publisher and advertiser revenue through innovative solutions that ensure user trust in an evolving and privacy-focused ads landscape.



Automation & Unified Marketing

Double-down on Google's pivot to automation and cross-media across buying doors. Make modeling & x-media table stakes for excellence in digital marketing



First Party Data

Build a strong foundation of solutions for advertiser and publisher first party data to drive optimization, monetization and measurement



Privacy & Regulatory

Evolve ads the industry to protect user privacy; get on the front foot with emerging regulations across competition, privacy and content

Google



Platforms, Publishers & Privacy GPL: Who we are

Platforms, Publishers & Privacy GPL - | [Logout](#)Vera Arthur
BBPAdvertiser platforms, Audiences (A2), Data, and Display (D2)
Sam TerresAds Privacy
Kavata MbondoPublisher Platforms
Diane Jones

GDA	DV360	Adv. Platforms	Data & Audiences	Ads Privacy	User & Regs	K. Lebeau	Web	Apps	Privacy
A. DiJulio Privacy	C. Friedman Bidding & Opt	S. Marin OMI Strategy	J. Nilesstrom Customer Data	J. Cohen OSO Strategy	L. Krug Web	L. Vider Reg	R. Arora Sandbox	S. Choi Pixel ID Buyers	S. Morris Regulatory
Y. Sharir Innovate & Create	E. Terrones Deals	Erin Powell NCSI AP Integration	B. Chang DV360 Audiences	L. Tong Customer Match	M. Guidice Apps	A. Hursh Reg	L. Purcell Audience & Data	C. Ozaner AP Integration	Prajneesh V. Bidding
T. Connor Roaring Mass	K. Trahan Measurement & Experimentation	Allene McIlwain AP Enterprise	M. Weinstein Data/Integration	H. Lim Segmenting & Privacy	Rant K. Activation	Alberto RG User	L. Selli AI & ML	S. Luo Tutorials & Demos	D. Giarrusso Web Privacy (selected)
K. Davis Formula & Inv			E. Phillips ITG / Integration	M. Forsythe DV360 Bidding & SF Audiences		S. Straightaway TVC - AV	Y. Wilbur Innovation	W. Cao Innovation APP	José Milord Newspaper Funding Choices
			H. Boggs OMI Interoperability				R. Vutay Pixel ID Buyers		Ryan Shultz App Privacy

Some key strategic questions in 2023

02 2023 Priorities



As we pivot more meaningfully towards cross-media in Google Ads, how will GDA's go-to-market evolve?



With First-Party Data as an imperative, how much will ingestion of it on the buy-side and enablement of solutions for the sell-side actually drive performance and scale?



How will our publisher and advertiser platforms stay focused on differentiated value in an increasingly fragmented identity landscape facing massive regulatory pressure?

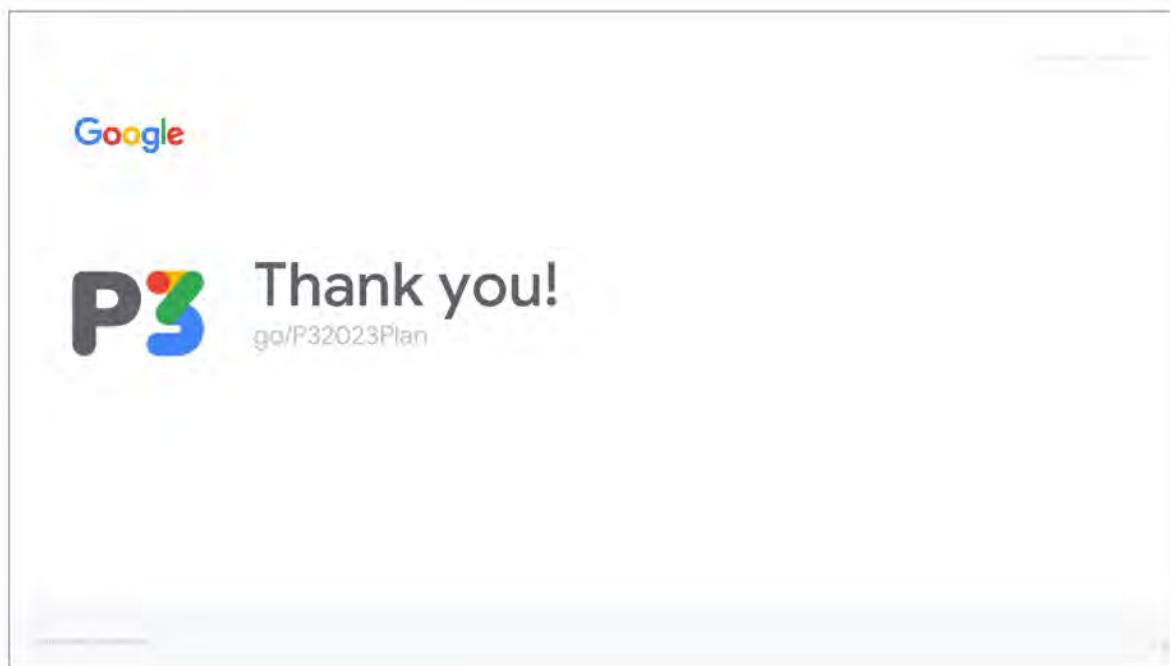


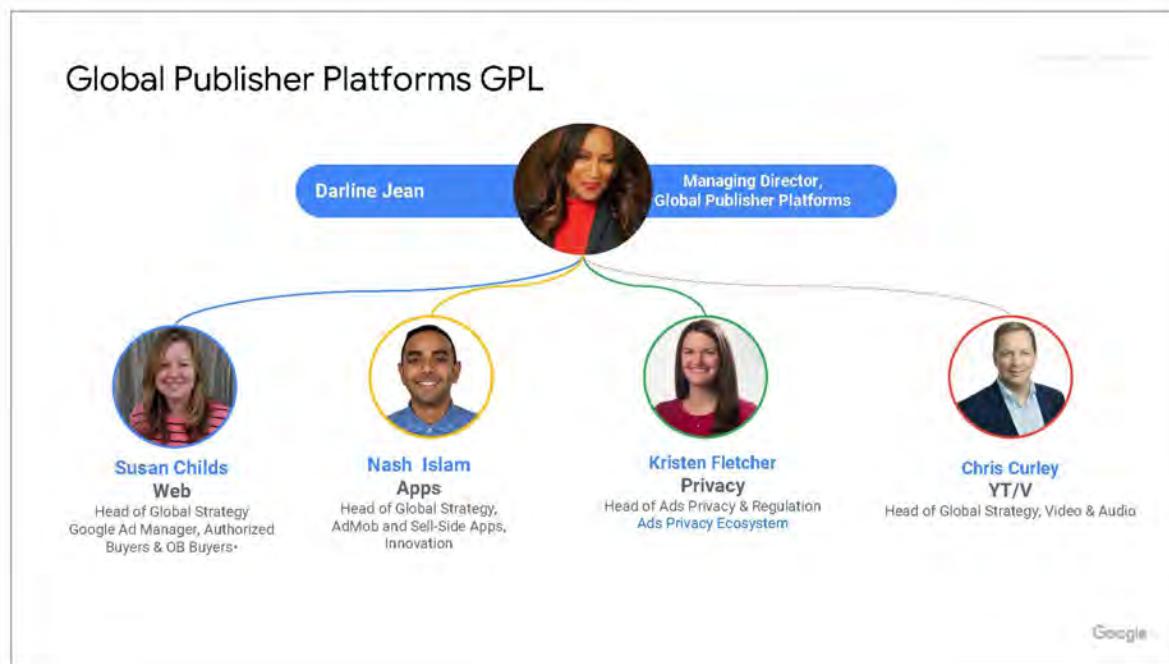
Will the privacy sandbox deliver enough utility and privacy to deliver its market adoption and privacy goals?



How can GBO deliver more orchestrated engagement with regulators and partners on regulatory matters, and will it deliver the right outcomes for our business?

Google





25 FTE supporting \$30B in gross rev - more than \$1B per FTE - very efficient department

Sellside is integral to Google's Mission

Google's Mission

Organize the world's information and make it universally accessible and useful.

Sellside Vision

Fund the world's information by enabling digital platforms, properties and content creators

Supporting a
Free, Open & Safe
Internet

Google

Sellside in Alphabet's Annual Report

Google Network
is the Sellside!

- 1 of 3 line items for Google advertising \$
- **\$31.7B in 2021**

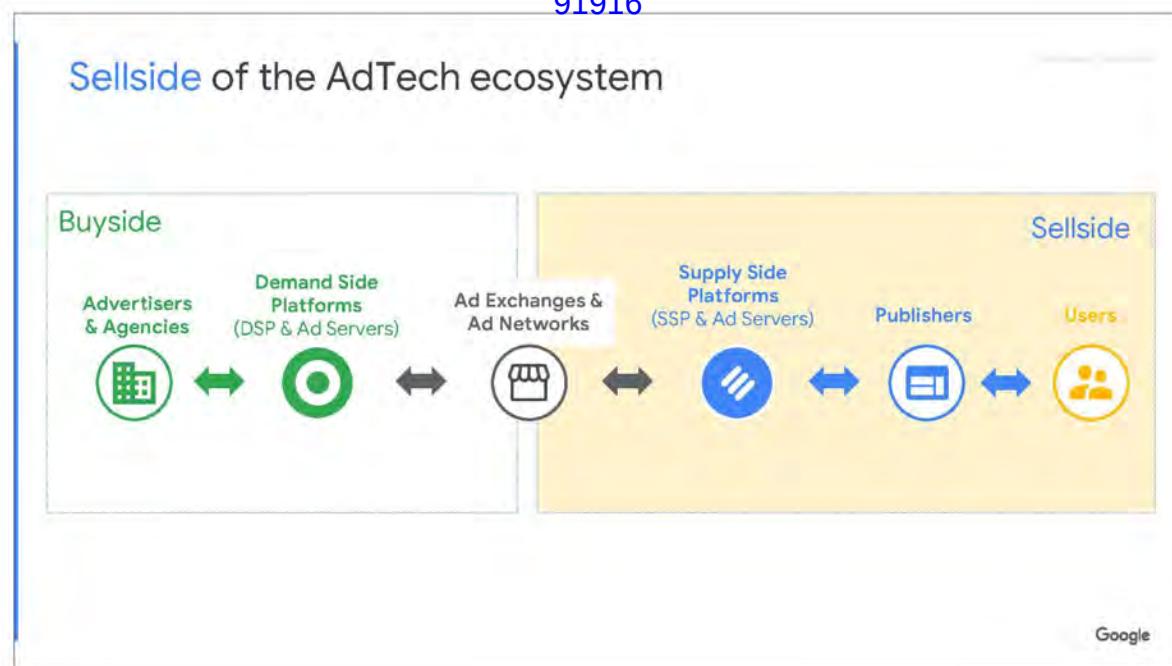


	Year Ended December 31,	
	2020	2021
Google Search & other	\$ 104,062	\$ 148,951
YouTube ads	19,772	28,845
Google Network	23,090	31,701
Google advertising	146,924	209,497
Google other	21,711	28,032
Google Services total	168,635	237,529
Google Cloud	13,059	19,206
Other Bets	657	753
Hedging gains (losses)	176	149
Total revenues	<u>\$ 182,527</u>	<u>\$ 257,637</u>

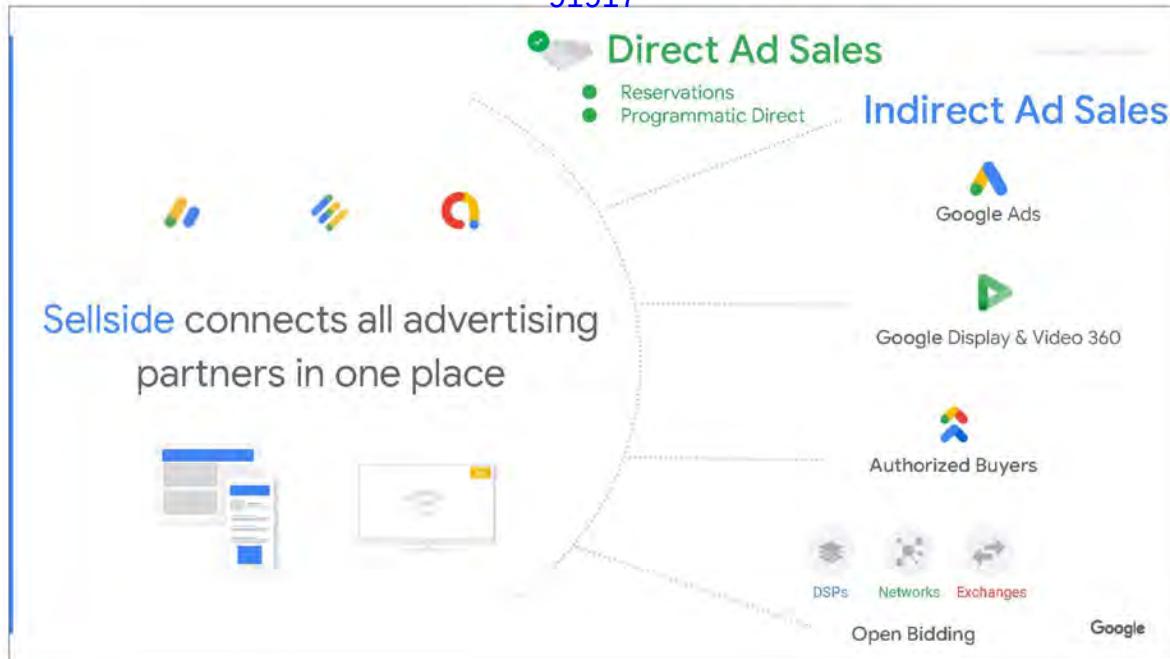
[Source: Alphabet 2021 Annual Report](#)

Google

Sellside of the AdTech ecosystem



Speak to how Goog O&O and walled gardens fit in here



Clarify the platform

Who Are Sellside's Partners



Call out big names, read the numbers



Global [Sellside](#) Sales Org: a unique group of stakeholders!

Sellside Org	Description	Buyside comparable
LPS	Large Publisher Sales	Head of business. High touch support model
OPG	Online Publisher Group	Tier 1, Torso & Tail. Scaled support model

Sellside mostly reports through VP Scott Sheffer to GP President Don Harrison, with exception of EMEA Buy & Sell reporting through country managers!

Google

What Publishers Care About

Monetizing Efficiently



- Yield Maximization (i.e. High CPMs) across Direct & Indirect ad sales
- Appropriate ads density
- Supply chain & fee transparency
- Stable & predictable revenue

Engaging Users Safely



- Annoying ads that interfere with user experience
- Untasteful ads that diminish publisher brand trust
- Compliance with local & global regulations & norms

Google

Sellside 2023 Strategic Initiatives

Core Focus



Monetization Excellence

Programmatic guaranteed. Floor optimizations. Real-time bidding. Fee transparency.



Future of privacy & identity

Publisher-provided identifiers & audiences. Secure signals to connect data directly with advertisers.



Automation & Insights

New experiment types & automation workflows. Optimized pricing. Benchmarks & insights.

Innovation



New Inventory

New potential access to previously unaddressable inventory, particularly fintech, mobility & commerce.

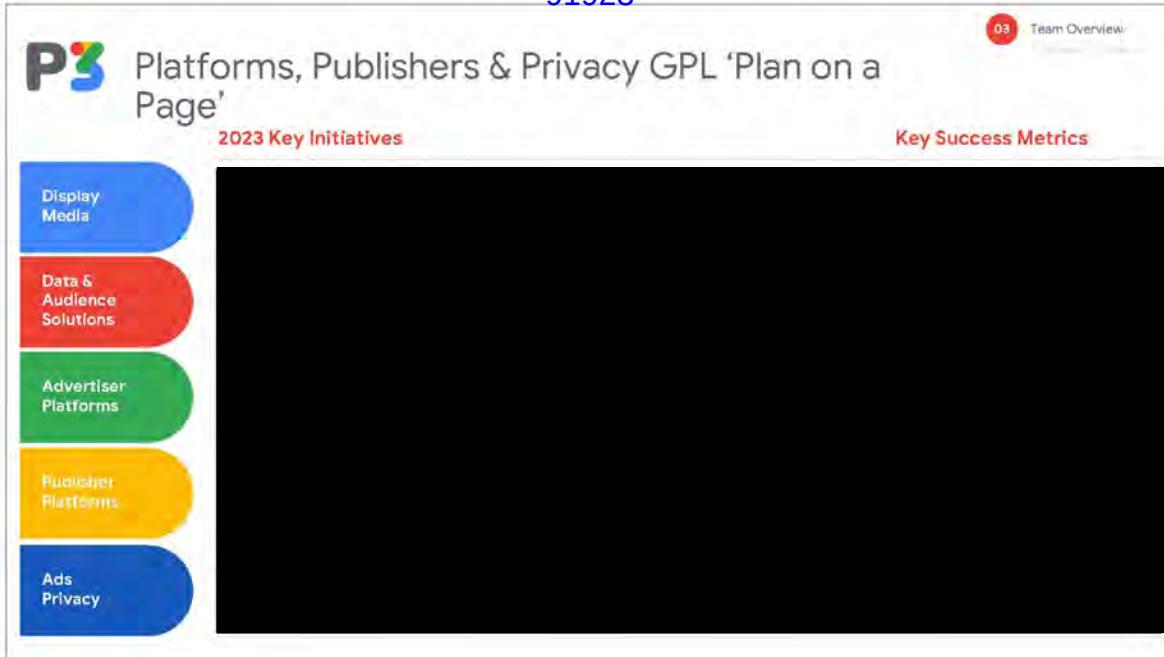


New Surfaces

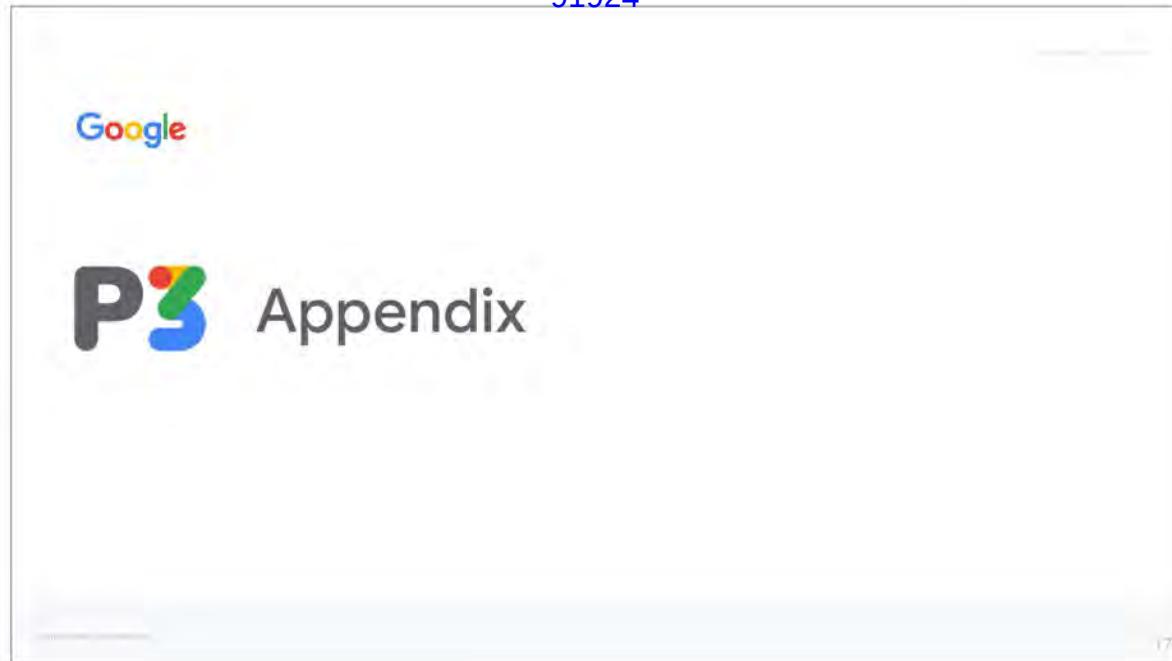
Ads in virtual worlds. Ads on small screens in-store & in-transit.

Google

How competitors connect Buy & Sell



More detailed plans by team:
Display Media
DASH
Advertiser Platforms
Publisher Platforms
Ads Privacy



2023 Priority	Planned Initiatives	Success Metrics
Evolve Go-to-Market		
Accelerate Universals & Attachments		
Privacy Transformation		
Innovation across buying doors		

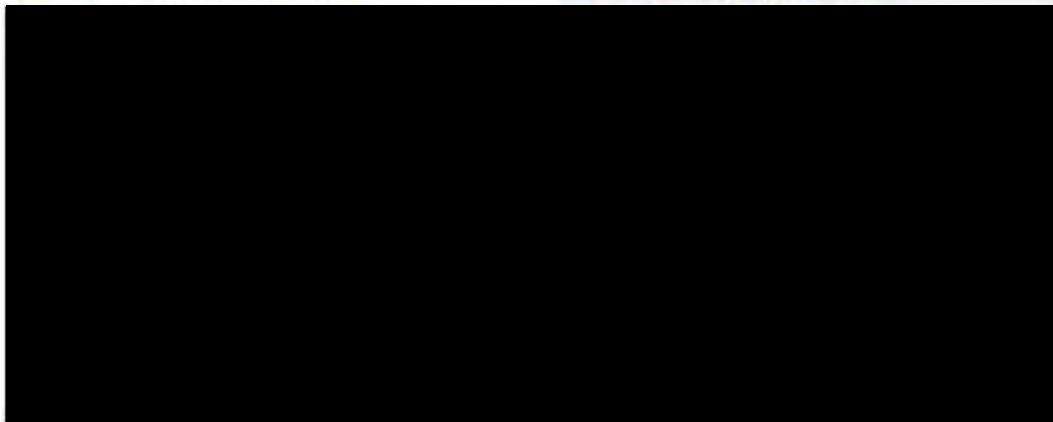
[Full Plan](#)

Display Media Sales & Service Recommendations

04 Team Plans

Sales & Servicing Recommendations

Sales & Servicing Support Needs



Data & Audience 2023 Summary Plan

Enable advertisers to be successful by delivering powerful, durable, and holistic data and audience solutions

04 Team Plans

2023 Priority Planned Initiatives

Success Metrics

Initiative	Success Metric
Advertiser 1P Data Ingestion	Advertiser 1P Data Ingestion
Advertiser 1P Data Activation	Advertiser 1P Data Activation
Future Proof Audiences	Future Proof Audiences
Data Expansion	Data Expansion

Google

Team Plan

Data & Audience Sales & Service Recommendations

04 Team Plans

Sales & Servicing Recommendations

Sales & Servicing Support Needs



Advertiser Platforms 2023 Priorities Summary

2023 Priority	Planned Initiatives	Success Metrics
New products and enhanced features built for cross-channel unification		
Customer loyalty and retention through investments in service, reseller and product partnerships		
Product and go-to-market excellence		

[Full Deck](#)

[External] Improve customer loyalty and retention through investments in service, reseller and product partnerships Resellers and Agencies: Scale our sales organization by delivering solutions, education and collateral for our Certified Partner Ecosystem. (METRICS: Global Partner C-Stat, measured by GCAS, GBX Deal Volume to 0)

Enterprise Features and Commercials: Increase focus on partner enablers such as APIs and Advertiser Management Platform Services (AMPS) to enable customization and value creation by partners. Shift commercial focus from discounting to value capture with new fees tied to feature value and reseller price consistency that encourages differentiation on service versus access.

Partner-First Go-To-Market and Narratives: Consolidate independent narrative efforts by feature areas and product initiatives to deliver a unified narrative and roadmap updates that empower our partners. Improve the agency experience and build communities across Tech, Media and Agency sales teams to maximize advertiser account coverage via a new 'Agency Experience Working Group' and 'GMP Communities' with GTM.

Display & Video 360 Product Partners: Expand DV360 integrations with non-Google solutions that deliver value and promote openness. (METRICS: Really Hard.)

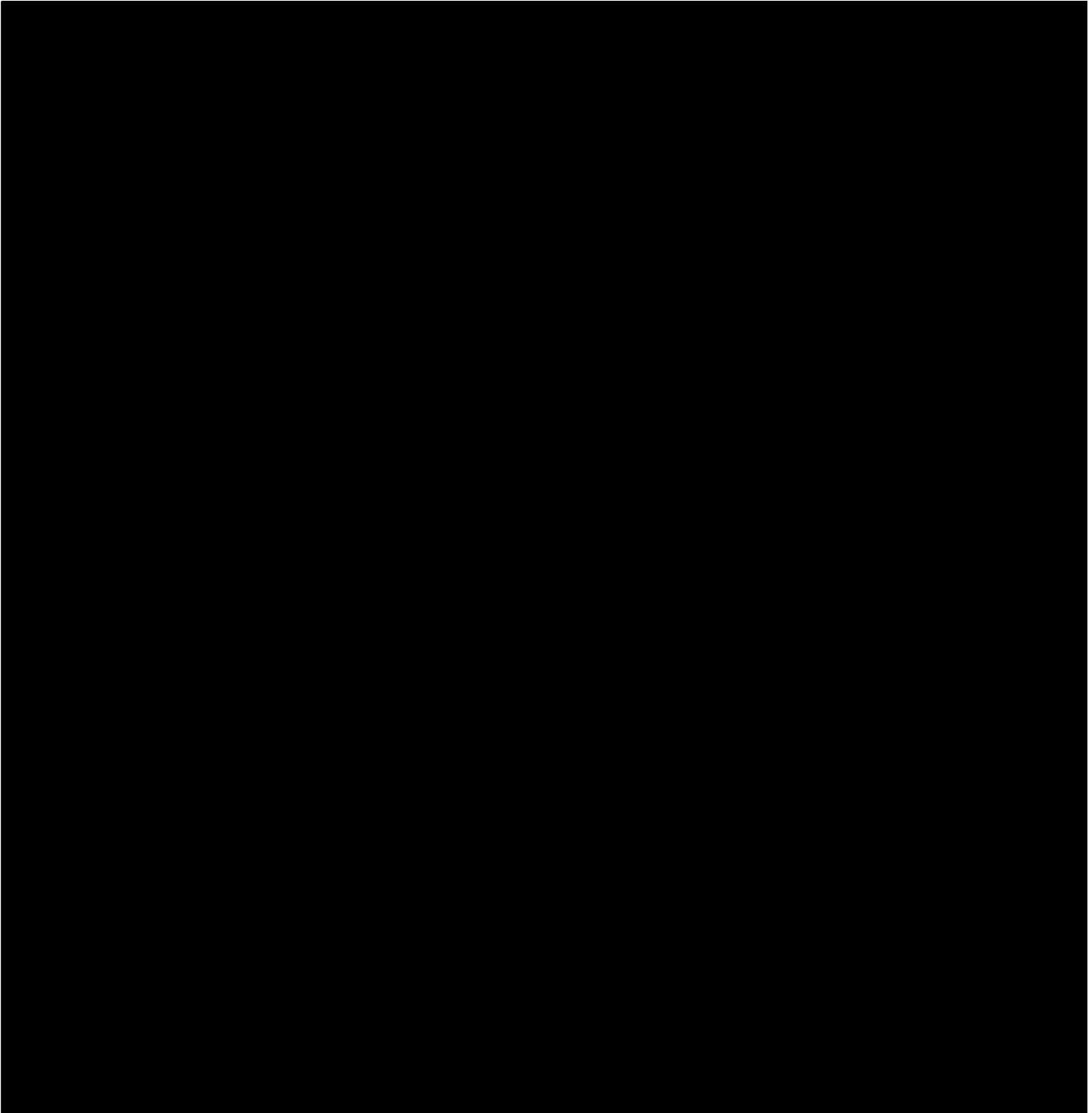
Inventory Strategy: Bring new rigor to the global exchange and inventory prioritization process. And, launch a new global publisher management engagement model across GPL, BD and Sales GTM.

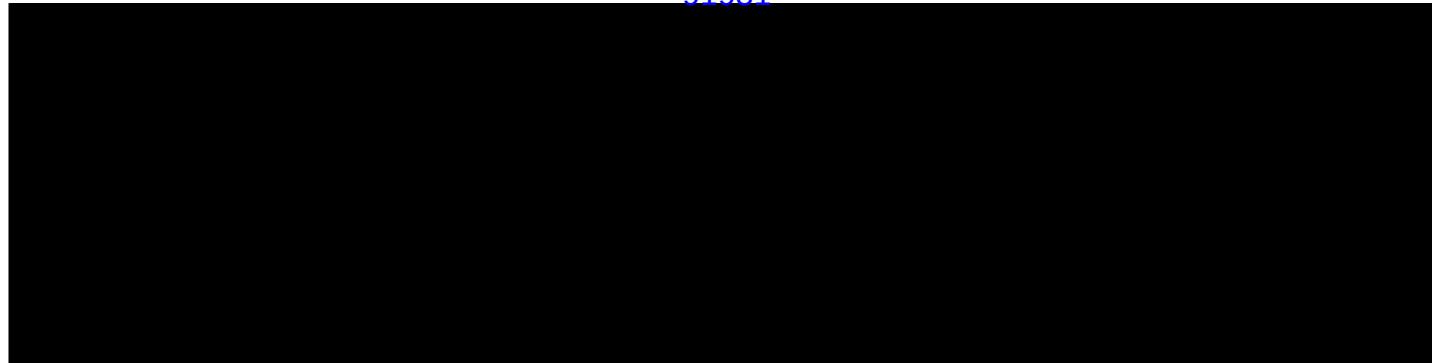
New Product Solutions: Expand on learning from Integral Ad Science and Double Verify to design a new suite of partner solutions that expands DV360 feature sets and openness.

Campaign Manager 360 Product Partners: Leverage CM360's buying door independence to increase adoption through trafficking and measurement integrations. (METRICS: GA4 / CM3 Account linkage, X new video integrations)

Measurement: Grow partnerships to support CTV and Video (i.e. ex. TTD, Netflix) as well as measurement integrations with GA4, landing 'Better Together' narrative.

Land Better Together Narrative - Provide guidance to sales and customers on how to leverage CM360 and GA4 measurement capabilities through and after 3pcd





04 Team Plans

Advertiser Platforms Sales & Service Recommendations

Sales & Servicing Recommendations

Sales & Servicing Support Needs

1

2

3



2023 Priority	Planned Initiatives	Success Metrics
Monetization Excellence for partners		
Innovation to support future growth		
Trusted, Clean & Privacy-centric Ecosystem		

Full Plan

Sales Metrics for 2023 (proposed)

Publisher Platforms Sales & Service Recommendations

Sales & Servicing Recommendations

Sales & Servicing Support Needs

1

2

3

Ads Privacy 2023 Summary Plan

04 Team Plans

2023 Priority	Planned Initiatives	Success Metrics
	Amplify Privacy-durable solutions and new technologies in Ads	
	Ensure Google ads compliance in ever-evolving regulatory environment	
	Drive Ecosystem Engagement and momentum for Ads Privacy	
	Build User trust through transparency & controls	

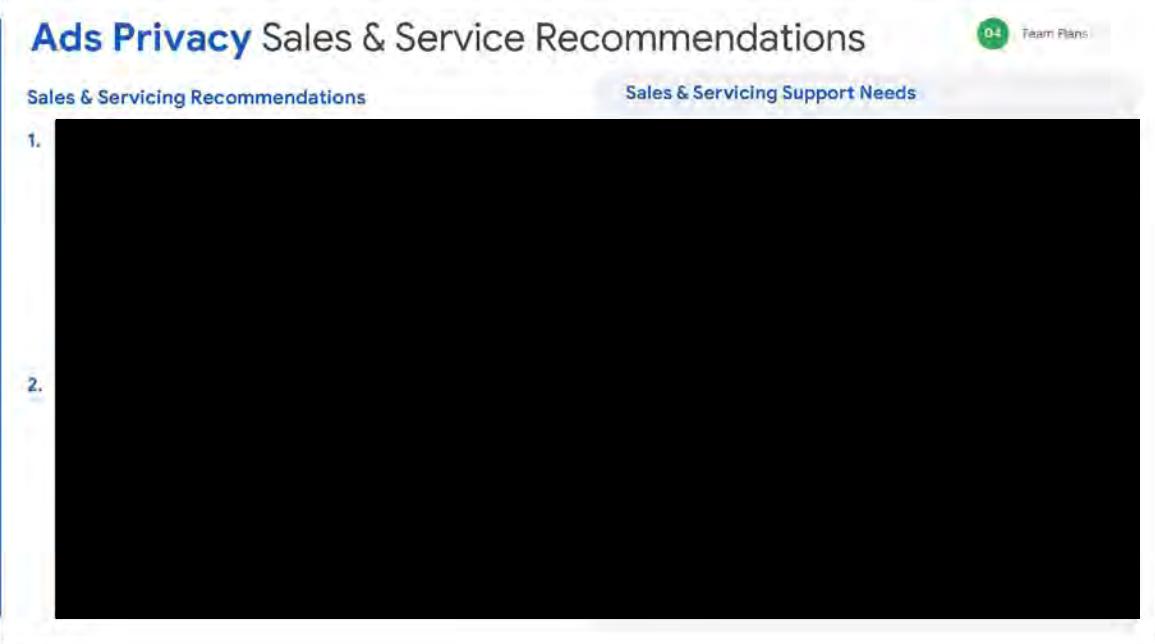
Team Plan

Ads Privacy Sales & Service Recommendations

Sales & Servicing Recommendations **Sales & Servicing Support Needs** **04 Team Plans**

1. [REDACTED]

2. [REDACTED]



2023 Planning Timeline

July 2022				August 2022				September 2022				October 2022																					
7/11	7/18	7/25	8/1	8/8	8/15	8/22	8/29	9/5	9/12	9/19	9/26	10/3	10/10	10/17																			
◆ Ads PM																																	
7.11 Ads Planning Kickoff	Aug-Sep: Product Area Group Strategy Summits Focus on Core Business Plans APaS 8/5-6 BAM 8/16-18 GDA 8/22-24 Selside 9/20-21 A1				9.12-9.15 SKO/KE Ads Leads Summit	9.12-9.15 SKO/KE Focused on Key Strategic Bets				9.30 PAG & SKO/KE plan submissions due	9.30 PAG & SKO/KE plan submissions due				10.10 Ads Portfolio Plans review with Jerry																		
◆ P2 GPL																																	
7.13 Planning Kickoff	7.20-8.11 GTM Strategy Discussions 7.20 Meas 7.28 PMax 8.4 LeadGen 8.11 Search 8.18 Privacy	8.25-9.15 P2 Directors Planning Sessions Review annual plans & x-team priorities	9.21-9.30 Finalize P2 Plan 9.21 GBO Central Tasks Due 9.23 P2 Team Plans locked 9.30 BFM Metrics Due	Oct: GBO Plans Finalize 9.28 GTM Exec Investment Themes 10.4 PStaff Strategic Priorities 10.28 P2 Plan review with Philipp																													
◆ P3 GPL																																	
August: Team Level Offsites & Planning Display Media ADAPT Ads Privacy Publisher Platforms Initial Team level plans																																	
9.12-9.21 Finalize Plans 9.12-14 P3 Team Onsites 9.27 P3 Team Plans Locked																																	
Oct: Set Targets & Shared BFM Metric Goals Team Level, P2 & GBO Q4R0 Planning sessions to Q4M+Pd																																	
◆ Product GTM																																	
Sept-Oct LCS/GCS/GCAS Planning																																	

P2 Annual Planning Deck / 'homesite'

P2 Leadership Annual Planning Slides

Ads PA Planning Timeline (access gated)

P2 Annual Planning Calendar

Big Bet & Strategic Question Topics list (access gated)

Ads 2025 Strategic Framework

Privacy Sandbox GPL 2023 Summary Plan

04 Team Plans

2023 Priority	Planned Initiatives	Success Metrics
Build Ecosystem Confidence Increase awareness and confidence in the Privacy Sandbox initiative		
Enable Frontline Teams Enable cross-google, frontline teams to inform, educate and drive ecosystem participation		
Support Scaled Messaging Partner with marketing and dev-rel on external materials		
Share Market Feedback Provide regular feedback to P&E product + GP summarizing sentiment, challenges, opps,		
Share Google Ads Updates Provide regular updates to P&E product and partnerships on google ads status/updates		
Support CMA Compliance Represent GBO in CMA		